

AILEEN LEVENTON

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SUMMARY

Practitioner, educator, writer, speaker, innovator, and advocate for the legal profession and its clients. Twenty years of active law practice experience for entrepreneurs and institutions. Member of the New York Bar for over 40 years. Gained widespread adoption of limited liability companies as flexible means of doing business as a leader of the NY Bar, nationally, and as one of the principal NY draftspersons. Successful entrepreneur and advisor. Pioneer in training lawyers to provide cost-effective legal services.

EXPERIENCE

PROFESSIONAL SERVICES

LAW STRATEGY COACH

www.lawstrategycoach.thinkific.com

AileenLeventon.com

2020 - date

2019 – date

Legal management consulting firm focusing on improving the practice of law through lean legal project management methodologies. Develop and implement strategies to optimize talent, process, technology and organizational infrastructure to support lawyers and allied professionals to attain excellence. Clients and pro bono work with law firms and their clients, law schools and other segments of the legal industry.

Areas of expertise: transactions, mergers and acquisitions, entity governance; commercial, toxic tort and IP litigation; tax implications of organizational structure of businesses; industry regulation; trusts and estates; real estate leasing and sales; environmental and energy law; not-for profits; due diligence, risk management, e-discovery, contracting, and compliance operations.

INTERNATIONAL INSTITUTE OF LEGAL PROJECT MANAGEMENT

PERTH, AUSTRALIA

Accredited Training Provider

Effective November 15, 2019

Legal project management and process improvement expert focused on improving legal matter planning and delivery, and efficiencies in legal operations. In collaboration with other experts, globally provide research, publish global practice guides and frameworks, develop workplace tools and deliver practical education that leads to internationally-recognized qualifications and global certifications. Through training programs on-site and through online learning programs, lawyers and other legal professionals build their legal project management competencies and experience.

EDGE INTERNATIONAL

2017 - 2019

GLOBAL

Similar work to QLex Consulting Inc and Blaqwell, below, with broad exposure to law practice around the world, particularly Australia.

QLEX CONSULTING INC.

2006 - date

Founded legal management consulting firm, which I continue to maintain as a business entity.

Employed Albany Law students as researchers for 3 years.

At its peak, the business model operated with 10 strategic alliances and contractors.

Selected engagements:

- Assisted firms handling fixed fee matters such as real estate leasing and purchase transactions, estate planning, commercial contracting and associated litigation, and regulatory compliance work, including intellectual property filings. Developed standard work practices promoting efficiency, risk management and profitability within the constraint of clients' limited budgets.
- Designed workshop series for Association of Corporate Counsel, now in its 9th year, which has trained over 1000 lawyers to support the ACC Value Challenge
- Designed and delivered professional development programs on law practice management for law departments, law firms, practice groups and individual lawyers. Topics include managing change, new business development, project management, process improvement, budgeting, financial monitoring and data analytics.

BLAQWELL INC.

2004-2006

NEW YORK, NEW YORK

Chief Operating Officer and Partner for early-stage legal management consulting firm

Representative engagements involved customized education programs, including workshops, retreats and individual coaching for lawyers and allied professionals to meet management challenges and to better understand market conditions.

THE McMANIGLE COMPANY

2002-2004

NEW YORK, NEW YORK

Business Turnarounds, Reorganizations and Crisis Management

Principal and Leader of Corporate Governance and Compliance Services

- Assist middle-market companies to restructure balance sheets by improving operational performance and increase professionalism. Function as interim executive management team member (COO, CFO or General Counsel) and advise, or serve on, the Board of Directors.
- Drive management focus to maximize asset values and grow revenues by developing strategies and implementing business plans for ongoing operations and new ventures.
- For companies in operational or financial distress, stabilize position and re-establish management's credibility with financial community, employees, and other stakeholders while implementing cost containment efforts. Identify and execute exit strategies and succession plans.

PRICEWATERHOUSECOOPERS LLP

1995 – 2001

NEW YORK, NEW YORK

Admitted to Partnership

1998

Client Service Partner and Chief Operating Officer,

Compliance Risk Management Group

2000 - 2001

- Responsible for financial performance, human resources, information technology, risk management, and marketing and sales activities.
- Member of executive management team of \$20 million roll-up practice with over 100 staff in 5 operating units. Became the second partner in group providing services to General Counsel and supported growth from staff of 15 to 60, and revenue growth from \$2M to \$8M in direct sales over five-year period.
- Guided practice group and staff awareness and adherence to new Firm standards (including independence policies) and reporting requirements after Price Waterhouse – Coopers & Lybrand merger.
- Assisted in transition after retirement of partner focusing on services to law firms and integration of law firm and law department consulting practices.
- Ran nationally-recognized survey research for law firm and law department annual benchmarking reports and special projects that have set the industry standard.
- Led high-visibility and sensitive client engagements with regular exposure to senior management. Responsible for methodology, program design, documentation, quality control, staffing and profitability. Leveraged existing relationships and market knowledge to cross-sell across lines of service to key Firm accounts in Fortune 500.
- Representative engagements:
 - Conducted reviews and developed recommendations for corporate compliance program design of decentralized Fortune 100 global pharmaceutical company.
 - Led controversial cost reduction review of legal and governmental affairs at largest telecommunications company for General Counsel; developed implementation plan for CFO and law department management; presentation to Executive Committee
 - Conducted organizational review to develop model for centralization of global legal and compliance organizations for Fortune 250 pharmaceutical company.
 - Developed online programs and technology for improvement of the effectiveness of compliance and business ethics programs and conducted benchmarking review for Fortune 100 pharmaceutical company.

LAW PRACTICE

THE EQUITABLE LIFE ASSURANCE SOCIETY

1986-1995

NEW YORK, NEW YORK
Vice President & Counsel

Legal counsel as member of mixed legal and business teams. Representative matters:

- Handled numerous sales and purchases of businesses with unsophisticated business executives. Typically these transactions were first of their kind for these clients.
- Investment advisory and real estate businesses, including securitizations (CBOs, MBSs) and new product development, working closely with investment banks and rating agencies.
- Transactions with private equity investors, including controversial work-outs and bankruptcies, strategic M&A activities and real estate matters.
- Design and implementation of enterprise-wide SEC and corporate compliance programs to support the Company's demutualization and IPO.
- Corporate governance: Addressed corporate secretarial, board of directors and parent-subsidary issues. Developed charter for Audit committee of Equitable Board. Supported shareholder services program for public company: commission-free programs, Dividend Reinvestment and Stock Purchase Plan, EQ Stock Fund of Investment Plan; Overhauled indemnification policy and directors' and officers' liability insurance coverage.
- Extensive counseling of business leaders seeking to assure that their businesses were in compliance with corporate policies.
- Developed money laundering compliance program and participated in reengineering of back office and systems support to simplify procedures relating to collections of policy premiums
- Training officer for continuing education of 100 Law Department professionals

PROSKAUER ROSE LLP

1978 – 1986

NEW YORK, NEW YORK
(Formerly Proskauer Rose Goetz & Mendelsohn)
Associate

Represented entrepreneurial mid-cap public and private companies and business owners in real estate, communications, retailing, technology, services and financial services industries in corporate and securities transactions. Pro bono work service non-profit organizations and private foundations.

PRESENTATIONS

Panelist and speaker at nationally-recognized continuing legal education programs, including American Bar Association (“ABA”), New York State, New York City and NY Corporate Bar Associations, and Association of Corporate Counsel (“ACC”) on substantive legal topics and law practice management techniques. Early adopter of e-learning and webinars as moderator and panelist for on-line seminars for Counsel Connect (1996). Topics include law practice management and legal issues relating to securities laws, corporate entity choice and governance, and legal opinions.

ILTAON 2020: *Legal Project Management Quick Wins* (Webinar, August 24-28, 2020)

Gimbal Virtual Coffee House: *Are You Making Money on Your Fixed Fee Work?*
(Webinar, July 8, 2020)

Rensselaer Polytechnic Institute, Lally School of Management: *Legal Issues for Entrepreneurial Firms - Best Practices for Working with Lawyers* (Webinar, April 27, 2020)

Legalweek 2020: *Identifying Key Metrics to Help Determine the Success of Your Legal Project*
(New York, February 4-6, 2020)

COLPM: Futures Conference 2019 -- *Visual Intelligence With Ron Friedmann* (Belmont Law School, Nashville, October 22, 2019)

ABA Business Law Section CLE Program: *Running Your Law Firm With Proven AI Applications from the Business World* (Washington DC, September 2019)

CLOC: 2019 Vegas Institute - Panel on Legal Project Management With Professionals From The General Counsel’s Office At Microsoft And Adobe (Las Vegas, May 15, 2019)

Corporate Legal Operations Consortium Webinar Series on Legal Project Management Architect, Moderator and Participant

Session #1 - *Overview of The CLOC Framework and LPM Intake* (March 8, 2019 Webinar)

Session #2 - *LPM Planning* (March 22, 2019 Webinar)

Session #3 - *LPM Executing* (March 29, 2019 Webinar)

Session #4 - *LPM Review* (April 15, 2019 Webinar)

Session #5 - *LPM Model Application* (April 26, 2019 Webinar)

Legal Marketing Association: The Practice Innovation Conference - *Measuring Economic Value Delivered Through Legal Services* (Chicago, May 15, 2018)

Ark Group: *Business Intelligence and Analytics in the Legal Profession* (New York, April 26, 2018)

Ark Group: *The Mechanics Of Law Firm Profitability - People, Process & Technology*
(Chicago, March 22, 2018)

ABA Task Force: *Legal Project Management in Mergers and Acquisition Transactions: Timelines and Gantt Charts* (Laguna Beach, January 26, 2018)

ELM Wolters Kluwer: *Driving Win-win Law Firm Client Collaboration: Shared Goals, Metrics, And Budget* (Orlando, November 15, 2017)

ACC Value Challenge: *Reduce Spending. Better Outcomes. Higher Predictability*
(Atlanta, April 26, 2017)

Texas General Counsel Forum: *Legal Project Management: Driving Efficiency, Lower Cost, and Predictability Through Planning* (Dallas, April 19, 2017)

New South Wales Bar Association: *Costs and Fees Committee Seminar*
(Sydney, Australia March 27, 2017) [[link to image](#)]

Advanced eDiscovery Institute: *Legal Project Management Roles And Responsibilities To Improve Efficiency And Communication* (Washington DC, November 11, 2016)

ELM Wolter Kluwer: 2016 User Conference - *Budgeting To Navigate The New Normal*
(Orlando, September 21, 2016)

Deal Lawyers: *The M&A Legal Resources For Acquisitive Minds - How To Apply Legal Project Management To Deals* (Webinar, July 19, 2016)

ABA Advanced Webinar: *Using Legal Project Management In M&A And Other Transactions*
(Webinar, June 15, 2016)

LEDES: *An Introduction To The New Mergers And Acquisitions Code Set* (Webinar, June 15, 2016)

ALA: 2016 Annual Conference & Expo - *Win/Win Pricing* (Los Angeles, May 23, 2016)

ACC NE Chapter: *Project Management For Law And Business* (Boston, April 5, 2016)

ABA CLE Program: Business Law Section Spring Meeting - *Introduction To The Guidebook for Managing Deals Efficiently And Effectively* (Montreal, QC, Canada, April 8, 2016)

ABA: *How To Compete With IBM Watson JD - Future-Proof Your Practice By Improving Efficiency Now - Part 2* (Webinar, February 25, 2016)

PLI CLE Program: Project Management for Lawyers 2016 – *After Action Reviews To Improve Your Practice, Minimize Professional And Business Risks, And Ensure Compliance* (New York, January 21, 2016)

Lexis Nexis: *Bridging The Gap Between In-House Counsel And Law Firms* (Webinar, January 13, 2016)

NALP Professional Development Institute: *Choosing Training Modalities That Meet Your Objectives* (Washington DC, December 4, 2015)

Defense Research Institute CLE Program: *Toxic Torts And Environmental Law - The Alphabet Soup Of 21st Century Legal Services* (Austin, November 27, 2015)

LMA: *Project Management For Law Firms* (Webinar, November 19, 2015)

University of Miami Law School /LawWithoutWalls: *The New Metrics Of Law Procurement, Project Management, Six Sigma, And Then Sum* (Webinar, February 5, 2014)

Ark Group: *After-action Reviews To Improve The Effectiveness Of Legal Services* (Webinar, December 4, 2013)

NYC Bar CLE Program: *Effective Project Management Techniques For New Attorneys* (New York, July 24, 2013)

Baker Tilly: *Pricing Models For Legal Services And The Role of LPM* (Webinar, July 17, 2013)

Ark Group: *Using After-Action Reviews To Improve The Delivery Of Legal Services* (Webinar, February 12, 2013)

Ark Group: *Practical Approaches In Transaction Matters Part 3* (Webinar, November 9, 2012)

Ark Group: *Legal Project Management In Complex Matters – Practical Approaches In Litigation Matters Part 2* (Webinar Transcript, October 19, 2012)

Ark Group: *Legal Project Management In Complex Matters – Practical Approaches In Litigation And Transactions Part 1* (Webinar Transcript, September 28, 2012)

International Legal Technology Association: *Alternative Fees And Budgeting* (Washington DC, August 30, 2012)

Annual In-House/Outside Counsel Series: *Reaching Common Ground* (January 19, 2011)

ACC Annual Meeting: *Outside Counsel Management -- Project Management For Successful Value-Based Relationships* (San Antonio, October 26, 2010)

Ark Group: *Appropriate Counsel - Choosing The Right Outside Legal Team By Focusing On Talent, Efficiency, And Value -- The New Granular Approach* (April 7, 2010)

The National Association of Women Lawyers: *The Annual General Counsel Institute -- Creating A Budget For Your Department Or Practice Group - Budgeting Tools* (September 27, 2007)

ACCA: *Best Practices For Budgeting In The Legal Department* (Sept 26, 2006)

Corporate Counsel Institute: *Managing Litigation As A Business Process* (January 21, 2000)

American Lawyer Leadership Summit On Dispute Management: *Bypassing Traditional Litigation - Fighting Smarter, Spending Less* (New York, November 8 and 9, 1999)

ACCA: *1997 Price Waterhouse Law Department Spending Survey - With A Twist* (Atlanta, November 18, 1997)

PLAC: *1996 Fall Conference And Annual Meeting -- Alternative Fee Arrangements* (Dallas, TX October 23-25, 1996)

The Law Department Cost Management and Governance Institute -- *Designing and Managing Preventive Law Programs* (Washington D.C., October 7-8, 1996)

Intensive Internet Workshop: *A Focused Presentation Of "Advanced Topics" Relating To The Use Of The Internet By Lawyers* (New York, January 23, 1996)

Northeast Real Estate Life Counsel Group: *Limited Liability Companies* (New York, June 8, 1995)

PLI CLE Program: *Opinions in SEC Transactions* (New York, June 14, 1995)

Association of the Bar of the City of NY: *Lawyers In Transition Committee -- Program On "Controlling Your Career"* (New York, April 25, 1995)

Corporate Bar Association: *Limited Liability Companies – Risk & Opportunities & Recent Developments* (New York, February 1995)

Glasser LegalWorks Seminar: *Unincorporated Limited Liability Entities: Negotiating, Drafting, Tax and Business Planning Issues* (February 9, 1995)

Guest lecturer, Columbia Business School Executive MBA Program – New Ventures Class (Spring 1995) *Speech notes on how to choose and manage a lawyer in establishing and managing a business, controlling costs; choosing a vehicle for doing business*

NY Citi Bar Association: *Lawyers in Transition* (New York, April 25, 1995)
Speech notes on career management topics

The College of Insurance: *Investments Of US Life Insurance Companies* (New York, 1994)
Topics: Investment management, asset allocation and strategies of US life insurance companies; impact on solvency, aspects of statutory and GAAP accounting and risk-based capital requirements. [2-day seminar for Latin American Insurance Company executives and insurance regulators].

PLI CLE Program: *Forming And Using Limited Liability Companies*
(New York, November 1994 and February 1995)

NY State Bar Association: *Corporate Law Committee* (January and September 1992)
Update on limited liability company legislation - moderator and contributor to panel discussions

American Bar Association Annual Meeting: CLE Workshop on LLCs Subcommittee of Business Law Section (August 1992)

American College Of Investment Counsel: *Securitization Transactions Workshop*
(Boston, May 1992)

Real Estate Board of New York: Legal Policy Committee (New York, May 1992)
Topic: Proposed New York limited liability company legislation

American College of Investment Counsel: *Focus on Assets* (Chicago, May 1991)
Topic: Securitization-collateralized bond obligations

PLI CLE Program: *Preparation of Annual Disclosure Documents 1986* (New York)

PLI CLE Program: *Representing Publicly Traded Corporations Under The New Integrated Disclosure System 1982* (New York)
Topics: The Revised Regulation S-K, Corporate Governance - Recent Trends, Liabilities of Directors and Officers of Publicly Held Companies

PLI CLE Program: *Preparation Of Annual Disclosure Documents 1982* (New York)
Topics: Collecting and Verifying Information for the Annual Disclosure Documents: Of Questionnaires and Other Techniques, Completing the Form 10-K: Due Diligence and Signature Requirements, Shareholder Proposals

PLI CLE Program: *Securities Filings - Review and Update 1982* (New York)
Topics: Collecting and Verifying Information for the Annual Disclosure Documents: Of Questionnaires and Other Techniques, Developments in Handle of Restricted and Affiliate Stock: Evolution of Rule 144

PUBLICATIONS

Articles in areas of expertise: LLCs; securitization; entrepreneur and start up issues; law practice management (including intellectual asset management, technology, cost management, operational effectiveness, alternative fee arrangements, pricing, legal project management); artificial intelligence and data analytics.

Media mentions in numerous publications relating to law practice management topics (omitted)

ARTICLES AND BLOG POSTS

Peer to Peer - ILTA's Quarterly: *Until The Ai Revolution Disrupts Timekeeping, Make The Most Of Phase Codes*, co-authored with Jenny Anne Horst-Martz (Spring 2019)

JD Supra: *How Law Departments Use LPM To Improve The Corporate Bottom Line* (June 27, 2019)

Edge International Communique: *Learning From Clients To Improve Decision-Making* (Aug 4, 2018)

Edge International Communique: *What Is Legal Value?* (April 24, 2018)

Edge International Communique: *After-Action Reviews - The Value Of Taking Stock* (Feb 5, 2018)

Edge International Communique: *Why Codes Matter: A Simple Tool With Many Uses* (Aug 29, 2017)

Edge International Communique: *The Kick-Off Meeting* (April 22, 2017)

Edge International Communique: *Establishing The Proof Of Concept For Legal Project Management* (December 27, 2016)

Bloomberg BNA: *Faster-Better-Cheaper Through Legal Project Management: The LACI Chart*, co-authored with Bill Kleinmann of Haynes & Boone LLP (June 21, 2016)

LexisNexis Business Of Law Blog: *UTBMS - A Breakthrough for M&A Codes* (March 24, 2016)

LexisNexis Business Of Law Blog: *Tools For Legal Project Management: The Kick-Off Meeting* (February 16, 2016)

LexisNexis Business of Law Blog: *LPM 102: Eight Critical Tools For Legal Project Management* (January 19, 2016)

LexisNexis Business Of Law Blog: *LPM 101: First Principles of Legal Project Management* (January 11, 2016)

Law360: *Law Practice Is Evolving Via ‘Legal Project Management’* previously published as “*How to Shape your Legal Team Communication Plan*” (May 15, 2014)

Thomson Reuters Practice Innovations: *Distressed Litigation With Legal Project Management*, co-authored with James Buckley (March 2013)

NALP Bulletin: *Communication – A Foundation for Many Relationships (or How Legal Project Management Aligns Team and Clients)* (July 2012)

Counsel to Counsel: *Assessing The Field: How Legal Departments Use Lists* (March 2006)
Aileen quoted in article

ACC: *Alternative Fees in Litigation* (May 2000)
Aileen quoted in article

The General Counsel Forum: *Mitigating Risks Associated With Electronic Records*, co-authored with Donna Ahlandianakis (October 1999)

Law Firm Governance: *Making Outsourcing A Win-Win Arrangement* (1999)

Corporate Legal Times: *PricewaterhouseCoopers Survey Of General Counsel -- Law Departments Are From Mars, Law Firms Are from Venus* (July 1999)

PricewaterhouseCoopers: *Perspectives On Corporate Legal Management -- “Make vs Buy” The Outsourcing Decision* (Spring/Summer 1999)

CFO: *Automating In-House Counsel -- Corporate Law Departments Are Finally Getting Connected, For Sizable Savings* (February 1999)

The Law Governance Institute: *Best Practices Building Shareholder Value - The Role Intellectual Property Lawyers In Corporate Legal Departments* (Summer 1998)

The American Lawyer’s Corporate Counsel Magazine: *Bottom-Line Lawyering* (April 1998)

The American Lawyer’s Corporate Counsel Magazine: *Are Women Lawyers Different?* (April 1996)
Aileen quoted in article

NY Law Journal: *Justifying Costs -- Budget AX Falls On In-House Legal Departments* (April 25, 1996)

Strategic Alert Alliance - Joint Ventures & Partnerships: *LLCs - Companies Limited In Liability, Not In Promise* (August 1994)

New York Law Journal: *Limited Liability Company - An Alternative Business Form* (May 30, 1991)

61 Cornell L. Rev 1019: *Constitutional Law - Criminal Procedure - Independent Right Of Self-Representation In Sixth Amendment Permits Defendant To Act As Own Lawyer At State Criminal Trials* (1975-1976)

Journal Of Applied Behavior Analysis: *Effects Of Reinforcement On Children’s Academic Behavior As A Function Of Self-determined And Externally Imposed Contingencies* (1973)

Aileen acknowledged as research assistant

BOOKS

Primary Author:

Innovations In Legal Project Management (Ark 2018), contributing editor

Legal Value Track – Transforming Task Codes Into Predictable Pricing And Law Firm Profits (2018)

Best Practices For Using Utbms Codes For Merger & Acquisition Transactions – Practical Guidelines For Attorneys, Legal Operations Professionals And E-billing Specialists (2017)

Implementing Legal Project Management – The Legal Professionals Guide to Success (2015)
Abridged Special Edition for non-US market (2016)

The Institute for Public Policy Alternatives: *Summary Of Statutes Governing Voluntary Child Care Agencies In New York State* (August 1975)

Contributing Author:

Next Stage Legal Project Management: Future-proof Your Matter Management

(Globe Law & Business 2021) (*chapter contributor on professional development competency model*)

Building The Law Department Of Tomorrow (Ark 2017)

(*chapter contributor on LPM for corporate legal departments*)

Redefining Matter Management: A Best Practice Guide To Improving Processes And Profitability

(Ark 2017) (*chapter contributor on Legal Project Management roadmap*)

Business Intelligence And Analytics For Law Firms: Insights For A Shifting Business Ecosystem (Ark

2018) (*chapter contributor on learning from clients to improve decision-making*)

Using Legal Project Management In Merger And Acquisition Transactions 2nd Ed (ABA 2018)

The Power Of Legal Project Management (ABA 2014)

TESTIMONY AND LEGISLATION

Joint Public Hearing on Limited Liability Companies, NY State Assembly (June 11, 1992)

Signing Ceremony for LLC Legislation with Gov. Mario Cuomo (August 10, 1994)

HONORS

Invited Fellow, American Bar Association Foundation (2018)

Fellow, International Institute of Legal Project Management (2017)

Fellow, College of Law Practice Management (Inducted 2015)

Distinguished Service Award, Practising Law Institute (2001)

PROFESSIONAL AFFILIATIONS

CURRENT:

AMERICAN BAR ASSOCIATION, BUSINESS LAW SECTION

Founding Member 2015-date, Mergers & Acquisitions Committee Task Force on Legal Project Management (Project Manager)

Member since founding 2017, Legal Analytics Committee

CORPORATE LEGAL OPERATIONS CONSORTIUM (cloc.org)

CLOC is the leading global trade association for those supporting the infrastructure to promote effective and efficient law practice management

Legal Project Management Initiative

Participant involved in development of CLOC LPM Framework **2016 - 2019**

Design and delivery of 5-part continuing education webinar series. **2019**
Committee Co-Chair **2020 -date**

PUBLIC SERVICE ACTIVITIES

CURRENT:

Member since inception, Climate Smart Task Force, Village of Kinderhook, NY **2016 – date**

- Participated in obtaining over \$35,000 of New York State funding to support clean energy projects for this rural community in Columbia County.
- Promoted transparency in governance and augmented communications to expand community participation

EDUCATION

M.B.A. Columbia University **1994**

J.D. Cornell Law School (Managing Editor, *Cornell Law Review*) **1977**

B.A. State University of New York at Stony Brook (Summa Cum Laude) **1974**

Elected to inaugural chapter of *Phi Beta Kappa*

BAR

New York (Admitted 1978)

Admitted to practice in federal courts, SDNY (1978) and EDNY (1978)